

Annual Report 2018



Shakespeare
birthplace trust

A year in review

Introduction from CEO **Tim Cooke** and Chairman **Peter Kyle**

Caring for the world's richest Shakespearian heritage in Stratford-upon-Avon, the Shakespeare Birthplace Trust creates memorable and meaningful connections with the playwright's works, life and times for people everywhere.

In 2018 the five Shakespeare family homes and gardens opened the doors to Shakespeare's world for 835,000 visitors from around the globe – the second highest level of visits this decade.

Over 1.8 million children in more than 12,000 primary schools across the UK and beyond explored storytelling and poetry through our annual Shakespeare Week celebration. More than 2,000 schools introduced Shakespeare to their curriculum for the first time. A further 3,500 children from areas of cultural and economic deprivation in the West Midlands had potentially life-changing experiences as part of our Museums and Schools programme which is funded by the Department for Education and administered through Arts Council England. Our Stratford-based courses were filled to capacity by more than 19,000 students of all ages.

With more than 3 million users visiting our websites and social media platforms, our role as the 'go-to' digital destination for information about Shakespeare continued to grow. Access to our website shakespeare.org.uk grew by 21% and our social media following increased by 11%.

In April we formally became a National Portfolio Organisation (NPO) with funding from Arts Council England for ambitious new creative programmes across four years. The first fruits of joining the NPO family included Carrie Reichardt's *#ShakespeareAnne* exhibition, the *Fierce Sisters* performance, by performing arts company Mimbire, and Thor McIntyre's *Threads of the Unsaid* installation. This funding has also enabled us to establish our first six regional primary school hubs to extend our creative outreach to children and communities across the country.

Celebrations to mark the International Year of Women featured two special loans from our Collections. The 'Ventilator Sketch', a rare watercolour depicting the reality of women's exclusion from political life 200 years ago, was displayed for the first time in *Voice and Vote: Women's Place in Parliament*, an exhibition in the Palace of Westminster. A 17th-century bodice was one of four

Collections items presented in the Jamestown Museum exhibition *Tenacity: Women in Jamestown and Early Virginia*, which tells the story of the first women to arrive in the English colony over 400 years ago.

The significance to world culture of the 'Shakespeare Documents' – the key archival sources for William Shakespeare's biography – was formally recognised by the UNESCO International Memory of the World programme. The Trust led the successful bid by a consortium of organisations.

We struck two new partnership agreements that will enable the Trust to develop and share our unique heritage properties, Collections and knowledge. We are working with partners in Fuzhou, China, to recreate Shakespeare's Birthplace and Shakespeare's New Place at San Weng, a new international heritage and cultural centre. The project will support investment in our work in the UK to conserve, sustain and share the Shakespeare legacy in our care, and give millions of people who might never have the opportunity to visit his home town the chance to enrich their connection with Shakespeare in China. Closer to home, we are delighted to be working with the Coventry & Warwickshire Local Enterprise Partnership and Stratford-on-Avon District Council on improvements for Henley Street as the gateway to one of the world's great cultural destinations. We look forward to enhancing the setting for Shakespeare's Birthplace and expanding the experiences and services we offer to meet the changing needs of visitors.

We congratulate our former Chief Executive Dr Diana Owen on her richly deserved OBE in the Queen's Birthday Honours, an award which Diana herself described as a great tribute to the whole Trust.

Our sincere thanks go to our Trustees, Council members and everyone who has supported our charity in providing so many opportunities for people of all ages and backgrounds around the globe to enjoy Shakespeare's works, life and times.



“I found it very *powerful* and *emotive*.
It led to a long, lively debate with
my daughter.”

—
MIMBRE'S FIERCE SISTERS

We celebrated the *International Year of Women*

with two special loans, the
'Ventilator Sketch' and a
17th-century bodice.



'Anne Hathaway'

returned to her Cottage
and inspired the
#ShakespeareAnne exhibition.



Shakespeare's New Place
was a finalist in
**Horticulture Week's
Custodian Awards.**

***“A Bard's Paradise.
This place is the concentrated
essence of the man.”***

—
TripAdvisor



***“Totally
embracing,
warm and
absorbing.”***

—
TripAdvisor



***“Wow, this step back in history
is truly mesmerising
and unique.”***

—
TripAdvisor



Threads of the Unsaid

drew on popular memories of **Romeo and Juliet** gathered from visitors in the 'Recollecta Salon' and from online contributors around the globe. **#GiveaScript** was shared on **5 million** timelines.



“There are *so many things to see, games to play and activities to get involved with. We’re looking forward to the summer* so we can visit again.”

—
TripAdvisor

A welcome for all

Our people, places and programmes welcome nearly 1 million visitors a year from all walks of life, from all around the world.

In 2018, 835,000 ticket holders explored different aspects of Shakespeare’s world and creative legacy at his five family homes and gardens.

Our rich calendar of events was extended with a new winter programme which boosted low season attendance by 23%. The International Year of Women inspired a new Shakespeare & Women season, including a chance to meet the young ‘Anne Hathaway’ at her Cottage and hear about her romance and marriage to William. At Shakespeare’s New Place, another colourful character was brought to life in the shape of Francis Gastrell, facing a mock trial for his demolition of Shakespeare’s New Place (popular verdict: guilty).

Our 65th Stratford-upon-Avon Poetry Festival presented a poignant and diverse programme commemorating the centenary of the end of the First World War. Inspired by the final words in the First Folio of Shakespeare’s works (*Cymbeline*), “Washed with such a Peace”, it featured recitals by actors Christopher Eccleston and Niamh Cusack.

In our first year as an NPO, contemporary artists brought fresh drama and spectacle. Thor McIntyre’s *Threads of the Unsaid* enchanted crowds at Anne Hathaway’s Cottage and online with his installation inspired by *Romeo & Juliet*. Carrie Reichardt’s *#ShakespeareAnne* exhibition was a radical take on Anne Hathaway and how popular culture and social media are changing the way we view and interpret history. Mimbres’ provocative *Fierce Sisters* at Shakespeare’s New Place invited audiences to consider the portrayal and interpretation of women.

“Rarely, if ever, have we encountered custodians as friendly, approachable, enthusiastic and knowledgeable as those we have met today.”

The passion and expertise of our teams is key to making our diverse audience feel at home with Shakespeare. In 2018 a new Welcome for All training programme was developed and delivered in-house by staff and volunteers to customer-facing teams. Ongoing improvements to accessibility included investment in audio description supported by the DCMS/Wolfson Museums and Galleries Improvement Fund. We worked with local councils and partners to develop a cohesive offer for AccessAble, which provides facts, figures and photographs to help people decide whether places are accessible to them.

Learning and participation

Pathways to Shakespeare enables people at every age and stage of interest, from primary school pupils to PhD students, leisure learners to academic and teaching professionals, to access Shakespeare. Here we highlight just some of the ways we inspired millions of people to engage with Shakespeare in the classroom and beyond.

Will's Wonderful Words rang out across the nation as 1.8 million primary school children took part in Shakespeare Week. The Big Shakespeare Poetry Performance was broadcast online to 45,000 children: patrons Baroness Floella Benjamin OBE, poet Ian McMillan and Sonnet Man Devon Glover led the celebration of poetry and storytelling with the children of Mapledene Primary School. The Big Shakespeare Book Hunt, in partnership with the Story Museum and Walker Books, sent 154 Shakespeare books into the wild to be discovered and shared by 26,000 children: #Shpassiton reached more than 2 million people on Twitter. More than 1,300 libraries received our Story Sacks to facilitate free storytelling sessions.

Delivered in partnership with some of Britain's best-loved cultural institutions, Shakespeare Week has so far given 6.5 million children a great first encounter with the world's best known writer, across every subject in the curriculum. Teachers report that as well as having fun with Shakespeare, children gain improved communication, creative and critical thinking skills, greater confidence, and wider horizons.

We established a network of Shakespeare Hub Schools to enrich the arts experiences of children and communities. Six hubs of six to eight schools are working with creative practitioners from a wide range of disciplines. Our hubs programme, supported by Arts Council England, is delivered free to schools. It provides platforms for

children to share their experiences with their peers, and Continuing Professional Development (CPD) sessions for teachers. These include the delivery of Arts Awards, working with arts organisations, and specialist training led by artists. Forty primary schools in the North East, Merseyside, Nottingham, Birmingham, Oxfordshire and London are among the first to participate.

Our first Museums and Schools project, Sharing Shakespeare's Story, was shortlisted for the Museums + Heritage Educational Initiative of the Year. We were delighted to be awarded Museums and Schools funding for a further two years to facilitate our work with schools in areas of economic and cultural deprivation that had not previously visited the Trust. In 2018, 1,200 children from schools in Birmingham and Solihull, North Warwickshire and Worcestershire rose to the challenge of taking on the role of guide for the day at the Shakespeare family homes, and sharing their new-found knowledge and skills with their classmates and with visitors from all over the world.

Our formal learning courses in Stratford were again filled to capacity with more than 19,000 people of all ages. Teacher and student satisfaction was consistently rated at 98%. Bookings for our EFL (English as a foreign or second language) courses grew by 50%. In addition to school and student groups we welcomed special interest groups and individuals keen to nurture and share with others their passion for Shakespeare.



“This was teaching to get your teeth into. It has *enriched our students* and our staff.”

Poet and broadcaster **Ian McMillan** launched **Shakespeare Week** with the pupils of Thurcroft Infant School, Rotherham. **26,000 children** went wild for the **Big Shakespeare Book Hunt**.



“Loved the ‘mini’ guides across the sites, a great way for the kids to learn about Shakespeare and work on *confidence* and *public speaking*. Well done.”

3,500 children benefitted from our Museums and Schools programme.



Around 6,000 people of all ages

enjoyed crafts and games in the hands-on **Activity Tent** at Anne Hathaway's Cottage.

The Shakespeare Birthplace Trust was consulted on the script for **Sir Kenneth Branagh's film *All Is True*** and worked with Sony Pictures on promoting its release.

Hear the Ambassadors!

posed questions of diplomacy still urgent in our era of heightened international tensions. The exhibition in collaboration with the **University of Warwick** showcased items from our designated Collections.

Fialetti's *View of Venice* is reproduced (below) courtesy of Eton College.



More than 100,000 online visitors

checked out William Shakespeare's biography, the most popular page on the **Shakespeare** section of our website.



350 people played with **science, art and Shakespeare** at our fourth **Fun Palaces** event.



Sharing Shakespeare with the world

Digital developments enhanced access to the enjoyment and understanding of Shakespeare for more than three million users of our websites and social media platforms.

Enriched content and improved searchability boosted access to our main website shakespeare.org.uk by 21% to 3 million page views. A quarter of our online visitors tapped into our growing Shakespedia section, launched in 2017 to answer the most popular questions about Shakespeare's life and works.

Experiments to test and learn more about audiences' digital preferences included taking part in Culture 24's 'Let's Get Real 6' action research programme which investigated the social purpose of digital technologies for heritage and arts organisations.

A funding award from The Space (an Arts Council England / BBC collaboration) enabled teams across the organisation to be trained in the creation of high-quality video content. Within two months more than 46,000 people had viewed the first set of videos produced in-house.

In support of the global academic network, we took part in the Shakespeare Association of America Conference, the British Shakespeare Association Conference, and the International Shakespeare Conference. The Trust took up the Chair of the Partner Advisory Group of the UK's leading Doctoral Training Partnership, Midlands 4 Cities. We worked with nine universities to deliver Shakespeare Connected, 14 online exhibitions which showcase our Collections and disseminate academic research to a wide and general audience. In partnership with University College London, we welcomed another collaborative PhD studentship, working on the papers of the Stratford-upon-Avon Antiquarians.

Closer to home 3,093 local people took advantage of our free Community Pass to Shakespeare's New Place. In collaboration with Warwickshire Libraries we launched monthly Shakespeare For All open access readings of Shakespeare's works. Around 500 people attended our monthly Research Conversations. Our fourth Fun Palaces day brought 350 people of all ages together in playful exploration of science and the arts with a Shakespearian twist.



The Parish Register

which records **Shakespeare's baptism** is one of the **90 Shakespeare Documents** formally recognised by the **UNESCO International Memory of the World** programme.

Looking ahead

We will respond to the growing appetite for meaningful content, great experience and discovery, building on the unique Shakespearian heritage in our care to create encounters, as Shakespeare does, of personal and timeless import.

Our new Business Plan outlines the actions we will take during 2019 to increase access to Shakespeare and to develop a fresh strategic approach to future planning, sustainability and growth. It sets out the key work streams which will enable us to enhance:

- the reach and impact of our public engagement
- the interpretation and protection of the five Shakespeare family homes
- the care of our Collections and access to them
- the deployment and dissemination of our knowledge and expertise
- our development as a dynamic organisation with high levels of capability and financial resilience
- diversification of our income streams to support reinvestment in our charitable work

We are developing proposals for a master planning process to ensure we maximise the potential of our cultural assets and properties in the years ahead.

We are working with Stratford-on-Avon District Council and the Coventry & Warwickshire Local Enterprise Partnership on a jointly funded, integrated plan for a visitor-friendly facelift to Henley Street to enhance the setting of Shakespeare's Birthplace. The Trust will develop a distinctive new culinary and cultural destination cafe, while improvements to the streetscape and amenities will ensure a safe and welcoming social space for residents and visitors from around the world to enjoy.

A programme of creative work 'Inspired by Shakespeare',

supported by Arts Council England, will include celebrations of the 250th anniversary of the first Shakespeare Jubilee, in 1769, which brought greater prominence to Stratford-upon-Avon as Shakespeare's home town. In partnership with the Royal Shakespeare Company, with additional funding coming from Creative Producers International, we will jointly commission a public art project *I See The Future* designed by studio Anagram and the people of Stratford-upon-Avon to create playful, interactive sculptures.

With support from Arts Council England, we will establish three further Shakespeare Hub Schools to join the existing network of six hubs which has already benefitted 40 primary schools. By 2021 there will be 12 hubs across the country, providing opportunities for over 20,000 children to develop their own creative work inspired by Shakespeare. Our Museums and Schools programme, funded by the Department for Education and supported by ACE, will enable work with 3,500 children from 40 schools in areas of economic and cultural deprivation in the Midlands. Two million school children will explore art and design through our award-winning annual Shakespeare Week celebration.

Our international work in 2019 will welcome hundreds of thousands of visitors and students from around the globe. We will also support the academic network served by the International Shakespeare Association, develop cultural links with China through our project with the Municipal Government in Fuzhou and host diplomats from around the world at the annual Shakespeare Birthday Celebrations.



Grants and donations

from supporters are used to conserve the *historic houses and Collections items in our care*, and to acquire **new treasures** that illuminate Shakespeare's life and times.

Exclusive new retail

ranges inspired by our Collections accounted for 10% of gift shop sales in 2018.

All our income is reinvested in our charity.



Celebrating Shakespeare is at the heart of everything we do.



18th century oil painting of the High or Market Cross at the top of Bridge Street, Stratford-upon-Avon, decorated for the Shakespeare Jubilee of 1769.



Souvenir handkerchief created for the Shakespeare Jubilee organised by leading actor and impresario David Garrick in 1769.



In 2019 we will celebrate the **250th anniversary of the first**

Shakespeare Jubilee

which brought Shakespeare and his home town to international prominence.

Our people

Trustees



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John Russell
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Nick Abell



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Delia Garratt
Director of Cultural
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Heather Lees
Director of Finance & Planning
(to 31 December 2018)

Becky Cund
Director of HR &
Administration
(to 14 September 2018)

Financial Review

Extract of the Shakespeare Birthplace Trust's unrestricted income and expenditure for the year to 31 December 2018.

Income:	£000
INCOMING RESOURCES FROM CHARITABLE ACTIVITIES	6,691
TRADING INCOME	2,602
INVESTMENT INCOME	1,018
UNRESTRICTED DONATIONS	15
OTHER INCOME	499
TOTAL INCOME	10,825
Expenditure:	£000
RAISING FUNDS INCLUDING TRADING COSTS	3,019
CHARITABLE ACTIVITIES	6,724
TOTAL EXPENDITURE	9,743
NET OPERATING SURPLUS	1,082
LOSSES ON INVESTMENTS	(371)
TRANSFERS BETWEEN FUNDS	118
ACTUARIAL LOSSES ON DEFINED BENEFIT PENSION SCHEME	(411)
NET UNRESTRICTED SURPLUS	418

The Trust generated an unrestricted surplus of £418k (2017: £4,014k restated). Surpluses generated are reinvested in the charity to ensure that it is able to continue to fulfil its charitable objectives.

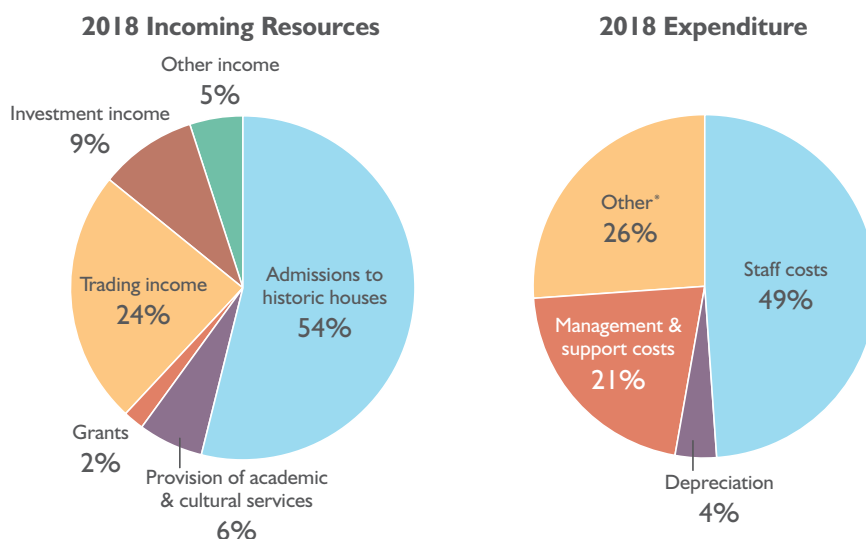
Admission income to our historic properties accounts for 54% of our incoming resources. This is generated from visitors during the year, and following a strategic pricing review in 2017 has continued to grow year on year. Income generated from our trading activities within our subsidiary company accounts for 24% of incoming resources, a slight decline on the previous year. Other sources of income account for 22% of income, largely generated through our investment properties and investment portfolio.

The largest area of expenditure for the Trust is staffing, which amounts to 49% of total expenditure. In total the Trust employs 279 people across all of the historical properties, trading sites, academic and cultural divisions as well as management and support functions. Management and support costs and other costs relate to maintaining and providing access to our historic properties and Collections, operating our retail and catering activities and providing award-winning learning programmes, including the national primary schools Shakespeare Week celebration.

At the end of 2018 the FTSE fell by over 12%, its worst performance since the financial crisis 10 years ago. This coupled with BREXIT uncertainty, Trump's trade war with China and the US interest rates increase, resulted in the Trust's investment portfolio suffering a valuation loss of £371k (2017: £316k gain).

See our full accounts online at shakespeare.org.uk/about-us/annual-report

At a glance review of the year



*Other costs include academic and cultural costs, maintenance and management of historical properties, management of the let estate and costs incurred in relation to trading activities.

Thank you

We are very grateful to all the individuals and organisations whose generosity in 2018 has helped to care for the Shakespeare houses and Collections, and to support our education and cultural programmes that inspire millions of people every year. Thank you.

Trusts, Foundations, Grant Makers and Corporate Supporters

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Partners and Community Supporters

Arts Connect
Association of Senior Children's and Educational Librarians
Society of Chief Librarians
Walker Books
Woodland Trust

Shakespeare's Birthplace America

Shakespeare's Birthplace America is a nonprofit 501(c)(3) organization dedicated to helping Americans connect with Shakespeare's life, works and times and to preserving the Shakespeare properties in Stratford-upon-Avon. We thank our generous supporters:

Michael Galvin
Charlie & Jane Goldman
Charles & Molly Thayer
(in honour of George L. Hacker)

Friends of the Shakespeare Birthplace Trust

Our warmest thanks also go to the Friends of the Shakespeare Birthplace Trust for their commitment and generosity and to all our donors including those who prefer to remain anonymous.

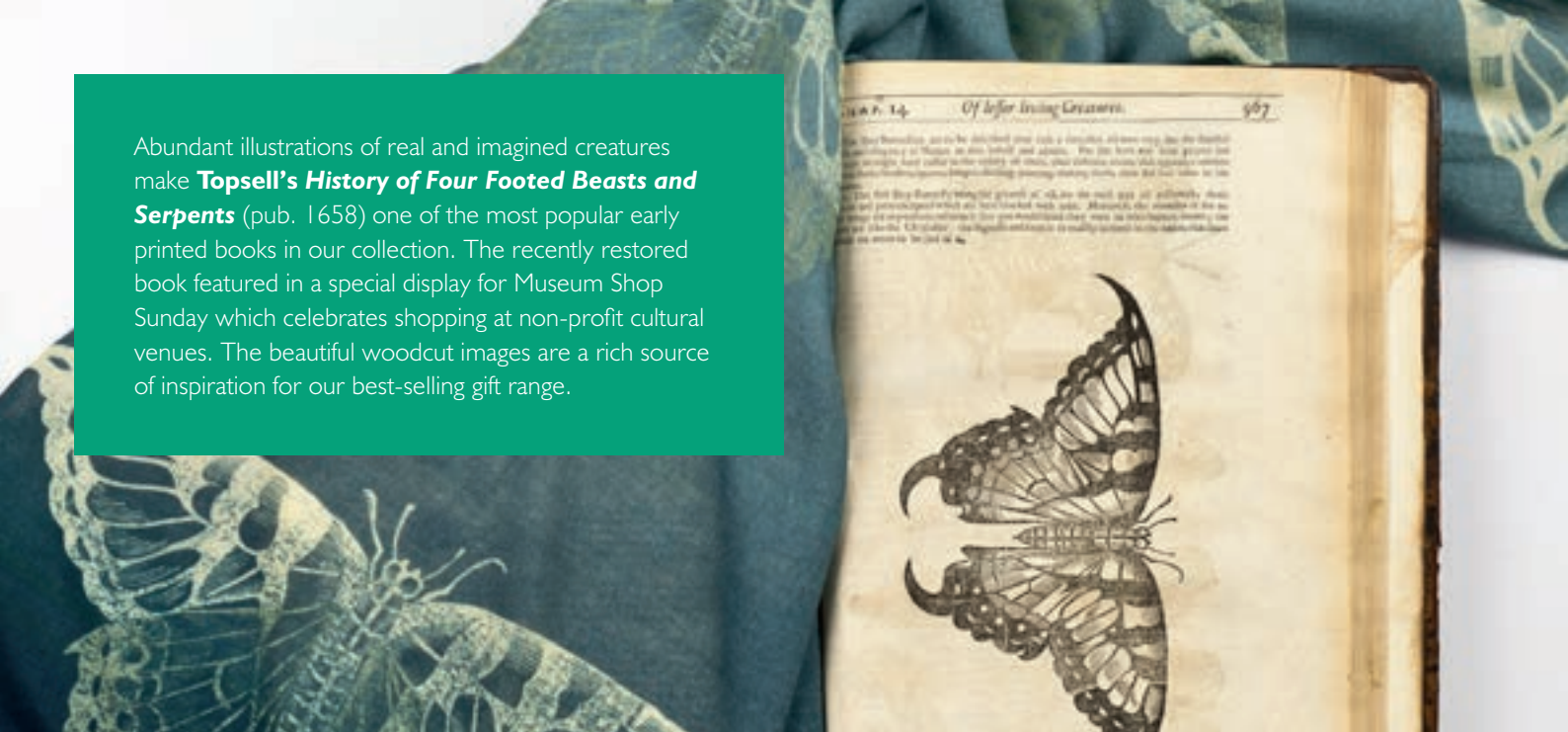
A very special thank you

Volunteers bring a wealth of skills and experience and play a crucial role in enabling the Trust to deliver its mission. In 2018 we welcomed 36 new volunteers, and total volunteer hours increased by 6% from 24,107 to 25,519 hours. Additionally, our Trustees gave 1,600 hours. We are grateful for the support of all our volunteers.



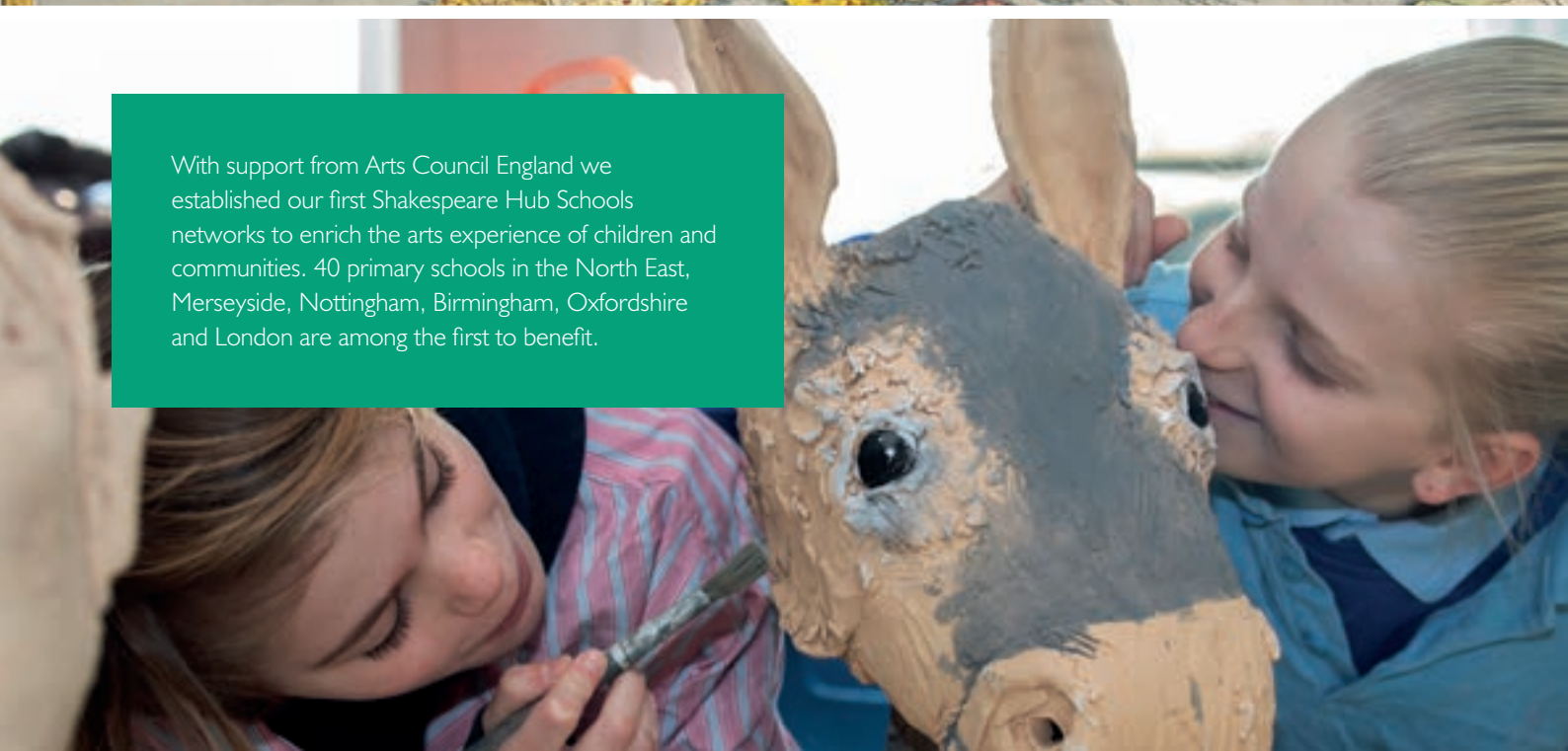
Roger Howells was posthumously honoured as Museum Champion at the West Midlands Museum Development Volunteer Awards. Roger was the lynchpin of the Trust's support to theatre studies for 22 years, giving an estimated 13,000 hours to the Trust. Several generations of researchers have benefitted from his work on theatre production records and his encyclopaedic knowledge of the Royal Shakespeare Company from the 1960s to the 1990s.

Abundant illustrations of real and imagined creatures make **Topsell's History of Four Footed Beasts and Serpents** (pub. 1658) one of the most popular early printed books in our collection. The recently restored book featured in a special display for Museum Shop Sunday which celebrates shopping at non-profit cultural venues. The beautiful woodcut images are a rich source of inspiration for our best-selling gift range.



The **acquisition** of this **1603 map of England by Abraham Ortelius**, creator of the first modern atlas, was enabled by the **generous gifts** of Angela Hartrey in memory of Patrick Hartrey. It is the earliest map of England and Wales in our Collections.

With support from Arts Council England we established our first Shakespeare Hub Schools networks to enrich the arts experience of children and communities. 40 primary schools in the North East, Merseyside, Nottingham, Birmingham, Oxfordshire and London are among the first to benefit.



The story doesn't have to end here.

We rely on supporters like you to help conserve the historic houses and Collections in our care so more people from around the world can discover and be inspired by Shakespeare. Please join us as a Friend or make a donation today.

Find out more: shakespeare.org.uk/support-us



Supported using public funding by
**ARTS COUNCIL
ENGLAND**



Department for
Digital, Culture,
Media & Sport

The Wolfson*
Foundation

PUBLISHED BY

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